

Hand Tools Market - Global Outlook and Forecast 2020-2025

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Hand Tools Market Report

The global hand tools market by revenue is expected to grow at a CAGR of over 4% during the period 2019–2025.

The global hand tools market is expected to grow 1.3X times during the forecast period. The market is expected to witness a considerable growth post-2020. Rapid industrialization and increasing applications in household and commercial sectors are primarily driving the market. Automobile, aerospace, construction, electronics, and shipbuilding are the major end-use of these devices. The tool industry landscape is moving toward sophistication and customization that can determine market leadership in a competitive scenario. Advancements in technology and the extensive usage of battery-driven devices have fueled the adoption of cordless power tools and related accessories that are light and durable. This growth factor for the substitutes is expected to challenge the potential of hand tools. The DIY culture can be one of the major drivers for these devices in the coming years with a high scope for penetration in growing economies.

The global hand tools market suffered a downfall during the COVID-19 crisis as most economic activities were halted during Q1 and Q2 in 2020. Most major revenue-generating end-users such as construction, automotive, commercial renovation, and home improvement activities were affected, leading to a decline in the market sales. Curfews and lockdowns prevented the extensive application of hand tools by workers and contractors, thereby affecting the overall revenue generation for the market during the period.

The following factors are likely to contribute to the growth of the hand tools market during the forecast period:

Rise in Home Improvement and DIY Activities

High Prominence in Asian Manufacturing Sites

Growth in Timber Construction

Growth in Application of Fasteners

The study considers the present scenario of the hand tools market and its market dynamics for the period 2019–2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

GLOBAL HAND TOOLS MARKET SEGMENTATION

This research report includes a detailed segmentation by

Product

End-user

Geography

The general purpose tools segment was the major revenue contributor in 2019 and is expected to grow at a CAGR of over 4% during the period 2019–2025. The volume of works carried out by general purpose devices, which include fasteners, striking tools, and pry bars, has grown significantly among penetrated DIY enthusiasts and for home-improvement professionals. Wrenches, screwdrivers & nut drivers, pliers, hammers, riveters, clamps and vises, wrecking bars, ratchets, and pry bars are the key types of hand tools in the segment. Commercial, residential, and industrial sectors are the major end-users of general purpose equipment, which are extensively utilized to perform small repairs, maintenance and other related project activities.

The industrial end-user segment contributed over 70% of the total market revenue in 2019, with the construction industry accounted for over USD 4 billion, followed by the automotive industry at USD 3.75 billion in 2019. The rise in the aerospace industry is expected to drive the growth of hand drills and fasteners as they are extensive application in assembly activities. While the shipbuilding industry is a major end-user for cutting and striking tools such as hammer, it is expected to grow at a promising CAGR during the forecast period.

The commercial end-user segment is expected to grow at a CAGR of over 4% during the period 2019–2025. The segment is expected to grow at a steady phase in the Middle East & Africa region due to the growth in commercial construction, including hotels and shopping malls. North America was the second largest revenue generator in the segment. The high volume of renovation and retrofit activities in commercial places such as shopping malls, corporate offices, hotels, and restaurants is driving the growth of the segment, whereas the growth in the tourism sector is another major influencer in Latin America and APAC markets, which can gain traction post the COVID pandemic.

The residential end-user category was the lowest revenue contributor that generated USD 2.27 billion in 2019. The preference for power tools, especially in the battery-operated segment for home improvement and DIY activities, is expected to dominate the hand tools market in the residential segment during the forecast period. While devices such as drills, wrenches, saws, utility knives, and measuring tools can find adoption in the sector, heat guns and glue guns from cordless segment are considered as the game changers of the DIY industry.

Segmentation by Product Type

General Purpose

Wrenches

Screwdrivers & Nut Drivers

Pilers

Hammers

Riveters

Clamps & Vises

Wrecking Bars

Ratchets & Sockets

Cutting

Chisel & Files

Saws

Knives & Blades

Cable & Wire Cutting Tools

Layout & Measuring

Taps & Dies

Segmentation by End-users

Industrial

Automotive

Aerospace

Electronics

Energy

Constructions

Shipbuilding

Others

Commercial

Residential

Segmentation by Geography

North America

US

Canada

Europe

UK

Germany

France

Italy

Spain

APAC

China

Japan

South Korea

Australia

India

Latin America

Brazil

Mexico

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

INSIGHTS BY GEOGRAPHY

China is the major manufacturing hub. The adoption of new equipment for production of a range of products require the importance of portable devices, which can be used in auto-body shops, construction sites, for fastening and assembling operations in retail stores. The automobile and aerospace industries in China make use of drivers and wrenches for mounting and fitting works, thereby influencing the growth of the tools market. The industrial production of Japan increased by 0.9 % in July 2019 and is expected to drive the hand tools market during the forecast period. Manufacturing of high technology vehicles requires prominent use of equipment such as wrenches, drivers, and other automotive tool kits, which are used for assembly, repair, and maintenance operations. Due to the rapid adoption of technology, fast-paced lifestyle, relying on machinery for production and trend of DIY culture, the scope and rise of cordless power tools in Japan is evident and expected to penetrate the market more during the forecast period.

INSIGHTS BY VENDORS

The global hand tools market is characterized by low market concentration and high competition among major players. The present scenario is driving vendors to alter and refine their unique value propositions to achieve a strong market presence. Currently, the market is highly fragmented and dominated by vendors such as Stanley Black & Decker, Emerson, Apex Tool Group, Snap-on and TTI are the major hand tools

manufacturers, alongside numerous domestic manufacturers that produce equipment as per the local demands and regulations. However, these major vendors have a global presence in three major regions: North America, APAC, and Europe which are the major hot spots for tool industry.

Prominent Vendors

Stanley Black & Decker

Techtronic Industries Company

Snap-on

Apex Tool Group

Emerson

Other Prominent Vendors

Robert Bosch GmbH

Ajay Group

Akar Tools Ltd.

Bojo

Channellock

Daniels Manufacturing Company

Estwing

Gray Tools Canada

Honiton

IDEAL INDUSTRIES

JCBL India

JK Files India

Kennametal

Klein Tools

KNIPEX

Kobalt

Leatherman

Lowell Corporation

Mac Tools

Ningbo Great Wall Precision Industrial Co. Ltd.

PHOENIX CONTACT

PILANA

Stiletto

Tajima

Vaughan Manufacturing

Wera Tools

Wiha Tools Ltd.

Wurth

Key Questions Answered:

What is the expected market size of the global hand tools market in 2025?

What are the factors impacting the growth of the market?

What are the drivers, trends, and restraints in the market?

Who are the leading vendors and what are their market shares?

What is the impact of the COVID-19 pandemic on the hand tools market?

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